Session 5: Module 11 - CPA-Determined Follow-Up	
SCRIPT	
Description	**Text**
Introduction	Welcome to Session 5 Module 11
Start	<no script>
<cpa1>	In this module, the last in Session 5, we are going to review the CPA Determined Follow-up section.
	This section is where you select the information that displays in the Household Member Information section, including Issuance Frequency, Education Frequency, Method and Topic.
	You are not required to open this window to complete the CGS but as a general rule of thumb, you should select Issuance Frequency for all participants.
	Click on the link to open the screen.
<cpa2>	The Issuance Frequency is required once this window has been opened.
	At subsequent certifications, the top three fields will auto-populate based on previous selections.
	Click the Issuance Frequency drop-down arrow.
<cpa3>	Since we typically provide benefits every 3 months, select Tri-Monthly.
<cpa5>	<no script>
<cpa6>	Next, click the Education Follow-up Frequency drop-down arrow to open the list.
<cpa7>	Select Tri-Monthly since we typically provide follow-up education when we issue benefits every 3 months.
<cpa8>	<no script>
<cpa9>	Click the Education Method drop-down arrow.
<cpa10>	We are going to select Individual because we provide one-on-one education to our participants.
<cpa11>	<no script>
<cpa12>	The Education Type and Education Topic are optional fields you can select in order to communicate an appropriate educational topic for the next contact.
	It is up to your Local Agency procedures to dictate whether or not you should use these fields.
	Click the Education Type drop-down arrow to see what the options are.

Description	Text
<cpa13>	The options are Primary Contact and Secondary Contact.
	These options should look familiar since we also saw them in the Nutrition Ed screen.
	The Education Topics list in the next field is populated based on the selection you make in this field.
	Select Primary Contact so that we can see what is in the Education Topic list.
<cpa14>	<no script>
<cpa15>	Let's click on the Education Topic drop-down arrow to open its list based on the selection of Primary Contact.
<cpa16>	The topics are the same as when you select Primary Contact in the Nutrition Ed screen; they include both CERTIFICATION and NUTRITION topics.
	Just like in the Nutrition Ed screen, the topics that appear are based on the participant's WIC Category.
	Click on the drop-down to close the list.
<cpa17>	Click on the Education Type drop-down arrow again.
<cpa18>	This time select Secondary Contact.
<cpa20>	<no script>
<cpa21>	Click the Education Topic drop-down arrow again…
<cpa22>	Now only NUTRITION topics are available.
	Click on the drop-down arrow to close the list.
<cpa24>	Click OK to save the selections and exit.
<cpa26>	The information we selected is now populated in the Household Member Information section.
	Now let's take a look at the CPA-Determined Follow-up in the Participant Folder.
<menu1>	The CPA Determined Follow-up function becomes important when issuing benefits…
	...because Issuance Frequency can only be changed in two places in M-SPIRIT…
	...and neither of them is in the Issue Benefits screen.
	The functionality to change the Issuance Frequency is only available in the CGS or via the Participant Activities menu in the Participant Folder.

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	We've already reviewed the function in the CGS, so let's click on the Participant Activities menu.
<menu2>	Select Review CPA-determined Follow-up Information from the menu.
<menu3>	<no script>
<menu4>	The window and its functionality is exactly the same as the CGS.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions forum on the Montana WIC website.